



ALBERT VIEILLE

The Natural Gazette

Your Market Report



N°14

4th quarter 2021

Your market report

The Natural Gazette is the quarterly market report from Albert Vieille

The Gazette provides you with updates on specific aromatic raw materials. This quarterly report incorporates the various factors that impact production and pricing – economic, geopolitical, climatic – to give you a broader view of price fluctuations and the quantities of raw materials available at the source.

Ever, our ranges

Ever, to last in time, Ever to capture the scents, Ever for everywhere on earth, Ever for ever.



Our tree resin distillations and extractions.



Our floral absolute production from the concrete.



Our aromatic raw materials sourced and transformed in Andalusia, Spain.



Our crafted qualities processed in our production center.



Our products sourced via our local partners network.

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Key



Market price fluctuation



Price down > -5%



Price stable -5 to 5%



Price up > +5%



Benzoin

Styrax tonkinensis



Laos



Harvest calendar



There was no crop in 2021 due to low global demand and carryover from last year but a tapping finally happened in September.

Our market position: Our partner ensures the sustainability of the resource by training his collectors in good harvesting practices. We ensure compliance with legislation at every stage of the supply chain, from harvesting to the export of the plant raw material and process the gum in our Spanish facilities.

Our product: resinoid benzoin n°3 & 5 available on DPG

Elemi

Canarium luzonicum



Philippines



Harvest calendar



The crop has been delayed this year because of a prolonged dry season. This drought has definitely caused a low production of resin.

Our market position: We work directly with a local family business. The harvesting practices ensure the regeneration of the resource and promote good working conditions and safety for the harvesters. We work on the identification and selection of canarium species, ensure the traceability from harvest to export, distill ourselves in our Spanish facilities.

Our product : elemi essential oil

Frankincense

Boswellia carterii



Somalia



Harvest calendar



The market is stable. The crop is regular.

Our market position: Collaboration with a local partner through a multi-year contract. Training in good harvesting practices is provided. We ensure compliance with legislation at every stage of the supply chain, from collection to export, and the gum is processed in our production facilities in Spain.

Our products: frankincense essential oil & resinoid

Myrrh

Commiphora myrrha



| Somalia



Harvest calendar



The situation is stable. The crop is regular.

Our market position: Collaboration with a local partner through a multi-year contract. Training in good harvesting practices is provided. We ensure compliance with legislation at every stage of the supply chain, from collection to export, and the gum is processed in our production facilities in Spain.

Our products: Myrrh essential oil & resinoid

Peru Balsam

Myroxylon pereiarae



| El Salvador



Harvest calendar



The harvest was poor due to heavy rains and wind preventing the collection. This therefore generated an increase in prices.

Our market position: We ensure fair remuneration through a community fund that helps provide safety equipment for workers. To protect the trees, training in good harvesting practices is provided to collectors by a local forest ranger. This supply chain is fully traceable and the gum is processed in our facilities.

Our products: Peru balsam rectified essential oil & resinoid

Styrax

Liquidambar styraciflua



| Honduras



Harvest calendar



There is no quantity available at that time on the market. The producers will produce in November.

Our market position: We have been a key element to develop a fair & sustainable sector. In early 2018, Albert Vieille financed a photovoltaic solar system in the APARFSS (association of styrax producers) building. We process the gum ourselves at our production center.

Our products: Styrax essential oil & resinoid



Myroxylon pereiarae



Jasmine

Jasminum grandiflorum



Egypt



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

The weather has been unusually cold till April this year and the crop has been late because of lack of warmth. The demand is not significant this year. The 2020 and 2021 prices are stable.

Our market position: We have been working with our partner farmer-processor for more than 15 years. Under a multi-year contract, our partner is committed to the preservation of biodiversity and the education of children. We support the development of crops diversification. We purchase concrete which is then transformed into absolute in our facilities.

Our products: Jasmine absolute

India



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

The crop which should have begun in June has been delayed because of rains. It finally took place in August. There are carry overs from last year, so availability is good.

Our market position: For more than 10 years we have been collaborating with our partner. We purchase concrete which is then transformed into absolute in our facilities.

Our products: Jasmine absolute

Jasmine Sambac

Jasminum sambac



India



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

The crop in India has been affected by covid-19. Less flowers have been picked, so the flowers' price has increase compared to 2020. So there is a slight increase of the absolute's price.

Our market position: For more than 10 years, we have been working with several local partners. The concrete, produced locally, is transformed into absolute in our Spanish factory.

Our products: Jasmine sambac absolute

Osmanthus

Osmanthus fragrans



| China



Harvest calendar

J | F | M | A | M | J | J | A | **S** | **O** | **N** | D

Expecting a slight increase on the next crop with a business impact on January 2022.

Our market position: Partner with long standing local farmers, we buy the concrete and then it into absolute in our facilities in Spain. Our historical quality of osmanthus comes from Anhui, Guangxi and Hubei provinces in China.

Our products: Osmanthus absolute, Osmanthus gold absolute

Rose

Rosa damascena



| Turkey



Harvest calendar

J | F | M | A | **M** | **J** | J | A | S | O | N | D

Our Partner has been audited in July 2021 and is now working on small non conformities. He also made a registration to ECOVADIS.

Our market position: We have been working with our farmer-processor partners for several years. We directly transform the concrete into Rose absolute.

Our products: rose absolute



Rosa Damascena



ANDALEVER

Cistus

Cistus ladaniferus var. beta maculata

| Spain



Harvest calendar

J | F | M | A | M | **J** | **J** | A | S | O | N | D

The campaign was stable, yields within the average and without problems of availability of raw material.

Our market position: Encouraging the conservation of traditional practices and culture linked to natural endemic resources. We work to improve community life. The sustainable and controlled management of cistus is crucial for the forest structure, preventing fire and helping the plant to restart: cistus is harvested by hand, and plough strips are created. Our facility is closed to the cistus source allowing us to reduced our carbon footprint. We work closely with the local environmental agency and meet all their requirements. Cistus growing areas are certified organic. Our cistus products are fully traceable.

Our products:

- Cistus essential oil, organic essential oil, essence
- Cistus absolute & SEV absolute
- Labdanum resinoid & absolute

Orange blossom

Citrus aurantium ssp amara

| Spain



Harvest calendar

J | F | **M** | **A** | M | J | J | A | S | O | N | D

The crop was very successful, and this new product is starting to be interesting in the market. Spanish price is very competitive and will be stable in the market with a limit quantity.

Our market position: Our new Orange blossom Absolute sustains Seville's historical orchards of bitter orange trees, through an exclusive partnership with traditional and local farmers. Fully traceable and cultivated without pesticides, the blossoms are transformed into absolute in our own extraction unit located near the collection area.

Our products: Orange blossom absolute



Blackcurrant buds

| France



Ribes nigrum



Harvest calendar



The next harvest will occur in December. Our partner has started an organic certification on a part of his plantation.

Our market position: Since 2006, we collaborate with a cooperative structure imposing strict rules regarding phytosanitary treatments allowing us to guarantee buds without any quantifiable pesticide residue. The entire transformation process is carried out in our facilities in Spain: from the buds to the concrete, then from the concrete to the absolute.

Our products: balckcurrant buds absolute.

Orris

| France



Iris pallida



Harvest calendar



The harvest occurred in end of August. The roots are under drying process before being processed in Aromazur.

Our market position: Albert Vieille has developed its Iris pallida plantations with producers on the Plateau de Valensole and in Hérault, in France. This project is part of a process of setting up traced and sustainable supply chains, from planting to processing. We guide each farmer in the organic cultivation of orris, the removal of rhizomes from the ground. We process the ground rhizomes at our production center in Spain.

Our products: Orris essential oil 8%.

Patchouli heart

| Indonesia



Pogostemon cablin



Harvest calendar



The situation is stable.

Our market position: We rectify the essential oil in our facilities, to obtain a 50% patchoulol essential oil.

Our products: patchouli heart essential oil

Pink Peppercorns

Schinus molle



| Peru



Harvest calendar

J | F | M | A | **M** | **J** | **J** | A | S | O | N | D

The crop has been delayed this year. It's a regular crop. The quality and the price are stable.

Our market position: The pink peppercorns are directly distilled in our production center.

Our products: pink peppercorns essential oil.

Pink Peppercorns

Schinus terebenthifolius



| Indian Ocean



Harvest calendar

J | F | M | A | **M** | **J** | **J** | A | S | O | N | D

Crop is considered good this year on all origins however still lower than 2020. This is mitigated with a lower consumption due to COVID season this year leading to carry over stock on the market. Price remains stable.

Our market position : We work directly at the origin through multi-year contracts with local collectors to guarantee availability and a fair price. We control the process of transformation of pink berries into CO2 extract.

Our products : pink peppercorns CO2 extract

Tonka beans

Dipteryx odorata



| Brazil



Harvest calendar

J | F | M | A | M | J | J | **A** | **S** | O | N | D

Crop started a little late this year due to the rainy weather, so we're expecting to have some availability here by November/December. Our production should occur early 2022.

Our market position: We collaborate with a company that coordinates nearly 500 bean collectors and is committed to ensuring fair remuneration for their activity. This makes it possible to maintain the harvesting activity and, as a result, to fight against deforestation. We process tonka beans ourselves at our production plant.

Our products: Tonka beans absolute.





Angelica

Angelica archangelica



| Belgium



Harvest calendar

J | F | **M** | **A** | M | J | J | A | **S** | **O** | **N** | D

Roots: The new harvest started in October. We already know that the situation will be tense because there is a lot of demand for this product.

Our product: roots essential oil, seeds essential oil

Buchu

Barosma betulina



| South Africa



Harvest calendar

J | F | **M** | **A** | M | J | J | A | S | O | **N** | D

Next harvest will be in 2022. The year 2021 was a good one with good weather and no major climatic events as in previous years.

Our product: essential oil

Cardamom

Elettaria cardamomum



| Guatemala



Harvest calendar

J | F | **M** | A | M | J | J | A | S | O | **N** | D

The new harvest started in October. The price of seeds should be lower than the last harvest and stable during it, if no weather phenomenon affects the plantations in the meantime.

Our product: essential oil

Coriander seeds

Russia



Coriandrum sativum



Harvest calendar



Russia has been facing cataclysms during July and August (drought, hurricanes, floods,...) There are large crop losses because of the weather conditions. Despite of that, there is enough raw material for production this year.

Our market position: Good availability at a very competitive price.

Our products: seeds essential oil.

Davana

India



Artemisia pallens



Harvest calendar



The availability is limited due to the March bad crop. The price has been increasing a lot these last months.

Our products: essential oil.

Cypress

Spain



Cupressus sempervirens



Harvest calendar



Market is stable. Availability is good.

Our products: essential oil.

Gaiacwood

Paraguay



Bulnesia sarmientoi



Harvest calendar



The situation is unchanged regarding the importation restriction. We should have new supply by the end of the year.

Our products: essential oil.

Cypriol

India



Cyperus scariosus



Harvest calendar



Cypriol season ended in June 2021. The new season is expected to start in January 2022 and the oil should be available in February 2022.

Our products: essential oil.

Geranium

Egypt



Pelargonium x spp



Harvest calendar



Farmers are not interested in selling at the current price level. With demand high we expect prices to rise in the coming months.

Our products: essential oil

Grapefruit

Citrus paradisi



United States



Harvest calendar



Texas harvest was impacted by weather conditions (frost and snow) which shifted demand to Mexico. Availability has remained good in recent months but this will not last and the price may increase.

Our products: essential oil

Juniper berries

Juniperus communis



Macedonia



Harvest calendar



There have been fires during the summer in some areas which will impact on quantities as well as price. We will have availability from other Eastern European countries in case of shortage.

Our products: essential oil

Lavandin Grosso

Lavandula x intermedia 'Grosso'



France



Harvest calendar



The crop was good and the price remains stable.

Our market position: We collaborate with several farmer-processors and cooperatives in Provence. We also act directly on the sector by supporting trials, carried out by the ITEIPMAI, on how plant cover impacts resistance to water scarcity in lavender and lavandin.

Our products: essential oil

Niaouli

Melaleuca quinquenervia



Madagascar



Harvest calendar



During the covid, this type of aromatherapy oil was widely used but at the moment the market is quiet. Producers have reduced the production but there is no problem getting quantities.

Our products: essential oil

Nutmeg

Myristica fragrans



Indonesia



Harvest calendar



The price has remained stable over the past few months, the limited availability of the raw material will lead to a steady increase of the price in the coming weeks.

Our products: essential oil

Orange blossom

Citrus aurantium ssp amara



Morocco, Tunisia



Harvest calendar



MOROCCO The harvest was good and the situation is stable.

Our product: Neroli essential oil, Orange blossom floral water absolute

TUNISIA The crop was good this year. The situation is stable. This is the lowest price of the last 8 years.

Our products : Orange blossom absolute, Neroli essential oil, Organic Orange blossom floral water

Roman chamomile | France, Italy



Anthemis nobilis



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

The harvest has finished in July. The yield was good. Note that in France, plantations have decreased by 15% between 2020 and 2021 (source = Conjoncture in France Sept 2021 France Agrimer).

FRANCE - Our market position: Albert Vieille has set up partnerships with French farmers-processors. These partnerships include supporting the producers in the development of their activity, from the farming of the fields to the distillation.

We encourage the sharing of knowledge and the transmission of know-how through the organization of inter-producer meetings.

This supply chain is fully traceable.

ITALY - Our market position: Our partnerships in the Piedmont region began 40 years ago when Mr.Vieille started working with a tarragon producer. Gradually, the producer moved towards cultivating Roman chamomile. Our agreements include the support of producers in the development of their activity, from field cultivation to distillation.

Our partners respect human rights and fair working conditions. Furthermore, they also work on their environmental impact, first by reducing the use of chemicals, second, by working on energy savings. This supply chain is also fully traceable.

Our products: From France, essential oil & organic essential oil. From Italy, essential oil & Fair For Life essential oil.

Rose

Rosa damascena



| Bulgaria



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

The rose harvest in 2021 encountered atypical climatic conditions. There was a lot of rain, low temperatures and too few sunny hours during the harvest, which prevented normal flowering. As a result, many roses were not harvested and many distilleries did not function and process the roses. However, the price remains stable.

Our products: rose essential oil

Rosemary

Rosmarinus officinalis CT cineole



| Morocco, Tunisia



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

MOROCCO : The Moroccan government authorized less collect than the last year (less demand due to Covid). And due to the high price this year, the producers have been afraid to buy. So the quantities are less than usual (-40%), and the price is going up.

TUNISIA : The market was stable but finally at the end of the crop, the yield decreased. Today, the demand is quite important and the price has slightly increased since last September.

Tarragon

Artemisia dracunculus



| Hungary



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

It was difficult to get supplies at the beginning of the year but there is now availability again.

Our products: essential oil

Scotch pine

Pinus sylvestris



| Bulgaria



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

The availability is good.

Our products : essential oil

Siberian pine

Abies sibirica



| Russia



Harvest calendar

J | F | M | A | M | **J | J | A | S | O** | N | D

The Russian forests have been closed during July and August because of intensive fires. There was no collect this summer, so only little quantities have been produced in May/June. Demand will exceed supply this year.

Our products : essential oil

Vetiver

Vetiveria zizanioides



| Haiti



Harvest calendar

J | F | M | A | M | J | J | A | S | O | N | D

On August 21st, a new earthquake hit Haiti (including Vetyver Oil producing areas, Les Cayes). There was a lot of destruction to property/buildings and many deaths. Some of the Vetyver Oil factories were damaged. It seems that some factories will take some time to rebuild. Production costs continued to rise.

Our products: essential oil



Salvia officinalis



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